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NTANA STATE HISTORICAL RECORDS ADVISORY BOARD

The Montana Archivist

VOLUME 1, NUMBER 2

WINTER 1999/2000

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Grant Money Available

The Montana State Historical Records Advisory Board (SHRAB) recently received word that its grant application to the National Historical Publications and Records Commission (NHPRC) has been approved. The regrant project will provide funds for local historical records repositories in Montana.

The Montana SHRAB received $57,746 for the project, the purpose of which is to help Montana local historical societies and museums, county governments, or other local repositories that hold historical records to identify and preserve historically-valuable records and make them accessible to Montana citizens and other researchers.

The funds will be allocated on a competitive regrant basis to conduct local projects such as identifying, inventorying, appraising, preserving, cataloging and describing, or otherwise creating better access to and care of records.

Up to ten repositories will be chosen to participate, with cash regrants ranging up to $5,000, depending on the project. Each repository also will receive the time and expertise of a full-time archivist/records analyst, who will spend up to one month on-site at each repository. The traveling archivist also will be able to go back and check up on the progress of projects as s/he travels from one repository to another.

Federal repositories/museums are not eligible.

How Do I Apply?

Coming soon to you will be a packet containing an application form, a sample completed application, tips for writing a grant application, and a list of *possible* projects.

In addition to the application form, you will be required to submit a self-assessment study and records plan of action. If you did not attend the self-assessment workshop offered by the SHRAB this past October, you may get a copy of the resource manual—*Preferred Practices for Historical Repositories: A Resource Manual and Self-Assessment Checklists*—by writing to the Archives, Montana Historical Society, P.O. Box 201201, Helena, MT 59620-1201. There is a $15 charge for the manual.

Repositories must demonstrate an abiding commitment to a sound records and archival program. The self-assessment will help repositories show that they have seriously thought about the need for an archival program and their ability to continue the program once the grant project ends.

Assistance with the self-assessment and with the grant application will be provided by SHRAB members. We want you to be successful!

PLEASE RETURN

HOW TO BASICS — What is Preservation Planning?

Libraries, archives, museums, and historical societies are responsible not only for collecting, interpreting, and exhibiting significant materials that document history, but also for the long-term preservation, security, and accessibility of these materials. Preservation is an integral part of a cultural institution's mission, and preservation planning should be part of its overall strategic plan.

The result of the planning process is the formulation of a written, long-range preservation plan. This is an important document for an institution to have.

- A long-range preservation plan delineates an institution's preservation needs and charts a course of action to meet these needs for its collections.
- It provides the framework for carrying out established goals and priorities in a logical, efficient, and effective manner; it is a working tool for achieving agreed-upon priorities over a set period of time.
- It helps maintain continuity and consistency in a preservation program over time.
- A plan validates the role and importance of preservation, helping to make preservation an equal partner with acquisitions and interpretation.
- It is an important aid in securing necessary resources to assist with implementation of recommendations.
- It records the past and current preservation activities and shapes the future efforts of an institution.

Every institutional plan is different. Some are long, complex, and detailed while others are short and simple. They all, however, flow from and are based on the needs assessment survey(s) the institution has done.

⇒ Preservation planning is a process by which the general and specific needs of or the care of collections are determined, priorities are established, and resources for implementation are identified.

⇒ Its main purpose is to define a course of action that will allow an institution to set its present and future preservation agendas.

⇒ In addition, it identifies the actions an institution will take and those it probably will never take so that resources can be allocated appropriately.

Needs assessment surveys are essential to preservation planning and must be carried out before a plan is drafted. A preservation plan is based on the needs of an institution and the actions required to meet these needs. This information is provided in the reports of the surveys. Many institutions have only one survey that considers the needs of all the collections in general terms.

For some institutions with numerous diverse collections and complex planning needs, additional surveys address particular problems or the needs of specific collections or types of materials may be required.

A survey covers the entire building in which collections are housed. Hazards to collections are identified, considering such factors as environment, storage, security and access, housekeeping, conservation treatment, and policies and practices. It is important to note that the building in which collections are housed is often itself a part of the collections. This is the case with an historic or architecturally significant structure. In this instance, the actions required to preserve the building as well as the collections it houses must be considered.

All this information should be recorded in a formal survey report. The report is the tool for drafting the preservation plan; it must contain information in plain language in an easily accessible form.

From "NEDCC Technical Leaflet, Section 1, Leaflet 1," which can be found in *Preservation of Library & Archival Materials: A Manual,* Third Edition, Revised and Expanded, Edited by Sherelyn Ogden, Northeast Document Conservation Center (NEDCC), 1999. For a copy of the complete technical leaflet, write to NEDCC at 100 Brickstone Square Andover, MA 01810-1494, call them at 1-978-470-1010, or visit their website at <http://www.nedcc.org>.

Doing A Self-Assessment

In October, the Montana SHRAB sponsored a workshop called "Chart Your Course: Museum/Archives Assessment." It focused on doing a self-assessment of your museum and/or archives. The purpose was to help you clarify your mission and priorities, and assess your operations and programs. Self-assessment is important because it helps you gain an understanding of where your museum/archives is now, where it can and should be in the future, and how you can lead it there.

So what if you missed the workshop—how can you conduct a self-assessment for the regrant application?

First, write to the Archives at the Montana Historical Society for a copy of *Preferred Practices for Historical Repositories: A Resource Manual and Self-Assessment Checklists.* The resource manual contains thirty-one chapters under eight broad categories. Since the resource manual is intended for both archives and museums, some of the chapters pertain only to museums or only to archives, although most chapters apply to both.

The broad categories and their chapters are:

ADMINISTRATION
Legal Authority
Boards
Mission Statement
Financial Management
Risk Management

COLLECTIONS MANAGEMENT
Acquisitions/Collection Development Policy
Deed of Gift, Deposit Agreement
Archival Appraisal
Accessioning/Registration
De-Accessioning
Arrangement of Archival Collections
Description and Cataloging
Loans

FACILITIES
Storage
Environmental Requirements
Pest Control
Security
Safety

CONSERVATION/PRESERVATION
Conservation Policy and Preservation Planning
Care and Handling of Collections
Duplication and Reformatting
Disaster Preparedness Plan

RESEARCH
Access Policy
Reference Service

OUTREACH/PUBLIC PROGRAMMING/PUBLIC RELATIONS
Outreach
Public Programming/Museum Education Program
Public Relations

EXHIBITIONS
Developing and Interpreting
Producing and Evaluating

STAFFING AND PROFESSIONAL DEVELOPMENT
Trained Staff
Volunteers.

The simplest way to do a self-assessment would be to use the checklists provided at the end of each chapter to rate how you are currently doing and to identify both areas that need improvement and priorities. Then using the checklists, write a records plan detailing what your priorities are and how you plan to address them. And you would, of course, identify the priority for which you want to apply for a regrant.

If your archives is a part of a larger institution, such as a museum or historical society, your assessment and records plan must take into account how the archives priorities fit in with the priorities of the larger institution. You must be able to demonstrate an abiding commitment to a sound records and archival program. You should include in your records plan a written statement pledging long-term investment of resources and dedicated space for the archives. Your commitment will be judged within the context of *your* resources.

Want help? Contact any of the following SHRAB members:
Kathie Otto, Montana Historical Society, 406-444-4775, <archives@mcn.net>

Jodi Allison-Bunnell, University of Montana, 406-243-2053, <jbunn@selway.umt.edu>

Kim Allen Scott, MSU-Bozeman, 406-994-5297, <aliks@gemini.oscs.montana.edu>.

The Montana Archivist

Montana State Historical Records Advisory Board

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Helena, MT 59620-1201

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News from Around Montana

Montana Historical Society

Recent Accessions—Manuscripts:

⇒ Walter Cooper Papers, 1883-1916, including photographs, memorabilia from the Montana Statehood Constitutional Convention in 1889 and the World's Columbian Exposition, financial records, and clippings. The collection was donated by Larry Peterson of Lake Oswego, Oregon. .2 linear feet.

⇒ Anna Dahl Scrapbook, 1940-1986, contains correspondence and clippings regarding Dahl and her work for rural electrification. The scrapbook was donated by Helen Rue of Plentywood. .2 linear feet.

⇒ John F. Griffith Scrapbook, 1942-1945. This unusual scrapbook, donated by his wife, covers Griffith's service during World War II. It contains correspondence, photographs, programs, and memorabilia. .2 linear feet.

⇒ Montana Territorial Penitentiary Expense Journal, 1886-1889, kept by U.S. Marshall Robert Sample Kelley. The journal was donated by Jean Voeller for the Mary Ellen Allen Estate. .2 linear feet.

University of Montana K. Ross Toole Archives

"Hallways to History." Prints of over 100 of the archives' photographs of Missoula and surrounding area are on display at Missoula's Southgate Mall. Captions explain the historical context of the images. The large, art-quality reproductions will be auctioned off at the end of the exhibit in three years; proceeds will benefit the Archives.

Linderman Collection Open. The papers of Montana writer/ethnologist Frank Bird Linderman are newly reprocessed and fully open for research. The collection, including correspondence, manuscripts, publications, photographs, and a few Plains Indian artifacts, has been at the University of Montana since 1961, but received significant additions between 1984 and 1992. A finding aid for the collection can be found at: <http://www.lib.umt.edu/dept/arch/mss007.htm>.

Montana Women In Their Own Words. The Montana Committee for the Humanities (MCH) awarded the Archive $2,115 to transcribe oral history interviews with Montana women. The interviews, conducted between 1977 and 1981, feature women discussing work, reproduction, and gender roles in the household for themselves and their mothers. The project is a cooperative venture between the K. Ross Toole Archives, the Women's Studies Program, and the Department of History. Public presentations for Women's History Month in March 2000 will showcase the unique contents of the tapes.